

Commonwealth of Pennsylvania  
State System of Higher Education  
Kutztown University



**KURFP-0239**

**Brand Refresh Research & Development**

**Issue date: July 8, 2015**

**Proposals Due:**  
**August 7, 2015**  
**12:00 PM**

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### SECTION 1

#### GENERAL INFORMATION

##### **1.1 Purpose**

The purpose of this Request for Proposal (RFP) is to solicit proposals from qualified firms able to provide Brand Refresh Research & Development for Kutztown University's Communication, Marketing and External Affairs Division, as outlined in Section 4.

##### **1.2 Scope of RFP**

This Request for Proposal (RFP) contains instructions governing the response to be submitted and the material to be included in the Contractor's response; a description of the service to be provided; selection criteria; and other requirements, which must be met by the Provider to be eligible for consideration. The Pennsylvania State System of Higher Education encourages responses from small firms, minority firms, women owned firms, and firms which have not previously worked for the System.

##### **1.4 Issuing Office**

The Purchasing Department of Kutztown University is the issuing office for this document and all subsequent addenda relating to it. The Purchasing Department is the sole point of contact with regard to all procurement and contractual matters relating to the requirements described herein. All communications regarding this RFP should be addressed to:

**Kutztown University**  
**Barbara Reitz, Procurement Services Manager**  
**PO Box 730, Kutztown, PA 19530**  
**phone: 610.683.4132 fax: 610.683.4836**  
**e-mail: [reitz@kutztown.edu](mailto:reitz@kutztown.edu)**

##### **1.5 Issue Date**

This Request for Proposal is being electronically issued: **July 8, 2015**.

## **1.6 Pertinent Dates:**

**Questions:** Questions will be accepted on PASSHE's eProcurement Exchange **through 11:00AM, July 20, 2015**. All responses to any questions will be posted on the eProcurement Exchange, along with any addendum.

**Response Date:** Proposals must be submitted utilizing PASSHE's eProcurement Exchange **on or before 12pm, August 7, 2015**. Late submissions cannot be accepted.

**1.7 Proposal Submissions:** To be considered, responses must be submitted using the format provided in the Section 2 titled, "Information Required". Proposals must be uploaded to PASSHE's eProcurement Exchange (<https://www.ebidexchange.com/PASSHE>). Proposals must be signed by an official authorized to bind the contractor to its provisions. The proposal must be valid for at least **90** days. Contents of the successful bidder's proposal will become contractual obligations with the University.

**1.8 Cost Data:** All applicable cost data must be in a **separate** document from the bidder's technical proposal. Costs will be reviewed only after the University has completed its review of the proposal. It should be noted that costs may not necessarily be the sole determining factor in Provider selection or contract award.

## **1.9 Cancellation of the RFP**

The University may cancel or withdraw a Request for Proposal in whole or in part at any time prior to award of a contract.

## **1.10 Oral Presentations**

Contractors *may* be requested to make an oral presentation of their proposal to the University. The purpose of such a presentation will be to clarify the Contractor's proposal to insure a thorough understanding of the project. This will be scheduled only if deemed necessary, and at no cost to the University. The University may, however, award the contract or determine finalists without benefit of an oral presentation.

## **1.11 Rejection of Proposals.**

The University reserves the right to reject any and all responses received as a result of this RFP, or to negotiate with any or all responding contractors.

## **1.12 Amendment or Withdrawal of Proposals.**

A proposal may be amended and/or withdrawn by a Provider through the eProcurement system prior to the due date.

**1.13 Disclosure Of Proposal Contents.** All responses and materials submitted with proposals become the property of Kutztown University and may be returned only at the University's discretion. Proposals will be held in confidence and will not be revealed or discussed with competitors, unless disclosure is required to be made (a) under the provisions of any Commonwealth or United States statute or regulation; or (b) by rule or order of any court of competent jurisdiction. Proposals submitted to the University may be reviewed and evaluated by any person other than competing contractors at the discretion of the University. The University has the right to use any or all ideas presented in any proposal.

Selection or rejection of the proposal does not affect this right. However, material of a proprietary nature will not be disclosed beyond University and System representatives, unless required by law. Pricing information cannot be considered proprietary.

Please be advised that effective January 1, 2009, all responses to this procurement opportunity are subject to the Pennsylvania Right-to-Know Law, 65 P.S. §67.101 et seq., (Act 3 of 2008). The Right-to-Know Law permits any requestor to inspect and/or copy any record prepared and maintained or received in the course of the operation of a public office or agency that is not subject to the enumerated exceptions under the law.

**If your response to the procurement opportunity contains a trade secret or confidential proprietary information, you should include with your response a separate signed written statement to that effect.** Should your response become the subject of a Pennsylvania Right-to-Know Law request, you will be notified by the procurement office to identify all trade secrets or confidential and proprietary information that is included in your response. This information may be exempt from disclosure in the agency response to a request.

**1.14 Award.**

The University shall, at its sole discretion, award the project to the Supplier whose proposal best meets the University's needs.

**1.15 Best and Final Offers.**

To obtain best and final offers from Contractor s whose proposals are determined by the University to be reasonably considered for an award, the University may, at its sole discretion (a) enter into discussions; (b) schedule oral presentations; and (c) request revised proposals.

**1.16 Prime Provider Responsibilities.**

The selected Provider will be required to assume responsibility for all services offered in its proposal whether or not it produces them. Further, the University will consider the selected Contractor to be the sole point of contact with regard to contractual matters.

**1.17 Inclusion of other PASSHE Universities.** Any services described above and purchased by the specified University in this RFP may also be procured by any other university that is part of the Pennsylvania State System of Higher Education ("PASSHE"), including the Dixon University Center (Office of the Chancellor) and the interested contractor agrees to supply these services to those universities on the same terms and conditions. To the extent that other universities procure from the awarded contract, they assume the liability for payment to the successful vendor.

**1.18 Negotiation Of Fees.** Negotiation of fees will be required only from vendor(s) chosen by the Selection Committee, based on the selection criteria cited in this RFP. Should negotiations fail with the selected vendor(s), the University shall move to the next selected vendor. The University reserves the right to conduct discussions with vendors, and to accept revisions of proposals, and to negotiate price changes. During this discussion period, the University will not disclose and information derived from proposals submitted, or from discussions with other vendors.

**1.19 News Releases.** News releases pertaining to the selection of the vendor shall not be made without prior written permission of the Issuing Office.

**1.20 Debriefing On Unsuccessful Proposals.** If a selection letter is not received within 120 days of the RFP closing date (or any written extension thereof), the vendor may assume that they were not awarded a contract. Upon written request, the vendor can be debriefed (verbally) as to the basis for their non-selection.

Requests for verbal debriefing must be made in writing to the attention of the "point of contact" person within 150 days after the closing date cited for receipt of responses to the RFP. The University will set

the time and location of the debriefing.

### **1.21 Provider Representations And Authorizations.**

Each Contractor, by submitting its proposal understands, represents, and acknowledges that:

- a. All information provided by, and representations made by, the Contractor in the proposal are material and important and will be relied upon by the Issuing Office in awarding the contract(s). Any misstatement shall be treated as fraudulent concealment from the Issuing Office of the true facts relating to the submission of this proposal. A misrepresentation shall be punishable under 18 Pa. C.S. 4904.
- b. The price(s) and amount of this proposal have been arrived at independently and without consultation, communication or agreement with any other Contractor or potential Contractor.
- c. Neither the price(s) nor the amount of the proposal, and neither the approximate price(s) nor the approximate amount of this proposal, have been disclosed to any other firm or person who is a Contractor, and they will not be disclosed on or before the proposal submission deadline specified in this solicitation.
- d. No attempt has been made or will be made to induce any firm or person to refrain from submitting a proposal on this contract, or to submit a proposal higher than this proposal, or to submit any intentionally high or noncompetitive proposal or other form of complementary proposal.
- e. The proposal is made in good faith and not pursuant to any agreement or discussion with, or inducement from, any firm or person to submit a complementary or other noncompetitive proposal.
- f. The Contractor has not, under separate contract with the Issuing Office, made any recommendations to the Issuing Office concerning the need for the services described in the proposal or the specifications for the services described in the proposal.
- g. Each Contractor, by submitting its proposal, authorizes all Commonwealth agencies to release to the Commonwealth information related to liabilities to the Commonwealth including, but not limited to, taxes, unemployment compensation, and workers' compensation liabilities.

### **1.22 Type Of Contract And Obligations.**

If a contract is entered into as a result of this RFP, it will be a standard Pennsylvania State System of Higher Education Service Purchase Contract, and will contain the Standard Contract Terms and Conditions shown in Appendix A. The University may in its sole discretion undertake negotiations with contractors whose proposals as to price and other factors show them to be qualified, responsible, and capable of performing the work.

The RFP, addenda, other agreed upon modifications, and the proposal submitted by the successful Contractor shall be incorporated into the contract agreements signed by the successful contractor, Kutztown University, and legal representatives of the State System of Higher Education, and the Commonwealth of Pennsylvania. Contractor will identify which, if any, of the terms and conditions contained in Appendix II it objects to, and must state specific clauses to which the Contractor takes exception, and propose alternative terms or conditions, as appropriate.

Contractors should be aware, however, proposals that are contingent upon any changes to these optional terms and conditions may be at a competitive disadvantage in the proposal evaluation process. Contractor's failure to object or to request additions will result in its waiving its right to do so later, but the University may consider late objections and addition requests if it is in the best interest of the University to do so.

Estimated time frame in which the University completes evaluations and issues an award letter is within approximately 30 days after the closing date for receipt of proposals. Up to an additional thirty days (30) days is necessary for PASSHE and legal approvals on the award after the agreement is signed by the Contractor and returned to the University. A Notice to Proceed will be issued after approval signatures are received from the Pennsylvania State System of Higher Education (PASSHE) and legal representatives.

### **1.23 Definitions**

- a. The reference terms of Contractor, Vendor, Supplier, or Company may be used interchangeably throughout this RRP.
- b. **Must, Required, Shall** – Requirement must be met in order for the proposal to be considered.
- c. **Desired, Should** – These issues are important and can impact the award decision significantly.
- d. **Optional, May** – Preferred issues, but not essential for consideration or award

## **SECTION 2** **INFORMATION REQUIRED**

The Supplier's proposal must be submitted in the format, as outlined below. To be considered, the proposal must respond to all requirements in this part of the RFP. The Supplier should provide any other information thought to be relevant, but not applicable to the enumerated categories.

The University reserves the right to request additional information which, in the University's opinion, is necessary to assure that the Contractor's competence, number of qualified employees, business organization, and financial resources are adequate to perform according to the contract.

The University may make such investigations as deemed necessary to determine the ability of the Supplier to perform the work. The Supplier shall furnish to the University all such information and data for this purpose as requested by the University. The University reserves the right to reject any proposal if the evidence submitted by, or investigation of, such Supplier fails to satisfy the University that such Supplier is properly qualified to carry out the obligations of the agreement and to complete the work specified.

### **2.1 Letter Of Transmittal, Management Summary and Work Plan.**

#### **a. Letter of Transmittal.**

The letter of transmittal must include an introduction of the Contractor's company, the name, address, telephone number, fax number, Federal ID number or SSN, and e-mail address of the person to be contacted, along with others who are authorized to represent the Contractor in dealing with this RFP.

#### **b. Management Summary.**

Include a narrative summary, which briefly describes the Contractor's approach to the proposal and clearly indicates any options or alternatives. This summary must include a brief "statement of understanding" that identifies the Suppliers knowledge of Kutztown University, its competitors, strengths and opportunities. It should also indicate any major requirements which cannot be met by the Contractor. This summary should highlight the major features of the proposal and identify any supporting information considered pertinent. In short, the reader should be able to determine the essence of the proposal and generally how well it meets the requirements by reading the management summary.

#### **c. Work Plan.**

Describe in narrative form your technical plan for accomplishing the work. Use the task descriptions in Section 4 of this RFP as your reference point. Modifications of the task descriptions are permitted; however, reasons for changes should be fully explained. If more than one approach is apparent, comment on the reason for this approach.

## **2.2 Personnel, Prior Experience and References.**

### **a. Personnel.**

Include the number and names where necessary, of professional personnel who will be engaged in the work, including resume or similar documents, education and experience. Indicate the responsibilities each will have in this project/service and how long each has been with your company. Identify subcontractors you intent to use and the services they will perform.

### **b. Prior Experience And References**

The qualified firm should describe their experience in providing branding research services for other higher educational institutions and/or corporations. In addition, Supplier is to provide a reference list of at least three different clients for whom Supplier has completed this type of service. References must include customer or institution name, address, telephone number, and contact name. Types of research performed should be described along with details of the populations queried and methods used. This information is to be completed on Appendix I Contractor Information and Reference Authorization Form.

**2.3 Cost Proposal.** Contractor's cost proposal shall include all related costs for undertaking this service (See Section 5 – Cost Proposal Instructions).

## **2.4 Additional Information.**

The Supplier should include any additional information pertinent to their capabilities and experience in their proposal. The Supplier should also note any prior work or affiliation with Kutztown University.

**2.4 Attachments.** The following attachments are to be completed and included with the proposal.

### **a. Contractor Information and Reference Authorization Form (Appendix I)**

## **SECTION 3**

### **CRITERIA FOR SELECTION**

#### **3.1 Mandatory Responsiveness Requirements.**

To be eligible for selection, a proposal must be (a) timely received from the contractor; (b) properly signed by the Supplier, (b) contain the required creative, technical and cost data.

#### **3.2 Selection Process.**

Proposals will be reviewed and evaluated by a committee of qualified personnel selected by the University. This committee will recommend for selection the proposal which most closely meets the requirements of the RFP and satisfies University needs.

#### **3.3 Evaluation Process.**

Proposals will be evaluated on the basis of the criteria enumerated in the RFP. The proposal evaluation process involves the review of all proposals received in response to the RFP to ensure that each proposal meets the mandatory requirements. Proposals which are determined to not meet the mandatory requirements are excluded from any further consideration. The selected proposals will then be reviewed further to determine the contractor which best fits the University's needs.

Negotiations will be undertaken with the contractor whose proposal shows that they are qualified, responsible, and capable of performing the work.

The contract shall be awarded to the contractor who has achieved the highest responsible score based on Creative/Technical and Cost Evaluations, and will be made only to responsible contractors qualified by experience to do the work specified. Kutztown University reserves the right to waive any technicality in any proposal and to award a contract in the best interest of the University. The University also reserves the right at its sole discretion to reject any and all proposals which do not meet the minimum criteria as defined herein and in the opinion of the University, regardless of costs provided.

### **3.4 Selection Criteria.**

Proposals received from contractors will be reviewed and evaluated by a committee of qualified personnel selected by the University. This committee will recommend for selection, the proposal which most closely meets the requirements of the RFP and satisfies the University needs. Proposals will be evaluated by the Committee using the following criteria, the order of which is not necessarily indicative of their weight or importance:

**Creative & Technical:** A Creative and Technical evaluation will be conducted independent of the Cost Evaluation. Creative and Technical Proposals which are evaluated as unacceptable will not be given any further consideration for award. Technical/creative factors may include:

- A. Quality of the proposal presented
- B. Understanding of the scope of work
- C. Staffing and experience of the Contractor to provide required services
- D. Qualifications and experience of the individuals assigned to the project
- E. References
- F. Interview/oral presentation; this may be scheduled at the discretion of the Evaluation Committee, and as deemed necessary for review of final candidates.

**Fee structure or costs:** fee structure and or costs for the appropriate services will also be considered in the evaluation, but will not be the sole determining factor.

## **SECTION 4**

### **SCOPE OF WORK AND REQUIREMENTS FOR BRANDING AND MARKETING SERVICES**

#### **4.1 Background.**

Kutztown University is a four-year institution of liberal arts and sciences. Kutztown University is one of 14 member universities of the Pennsylvania State System of Higher Education and has an enrollment of approximately 9,200 full and part-time undergraduate and graduate students comprising its student body. Its commitment to academic excellence in instruction and scholarship and proactive community service has contributed to its growth and success.

#### **4.2 Project Overview.**

Kutztown University is seeking a vendor partner that will assist in a brand refresh research and development study focusing primarily on new-student enrollment, campus engagement, and other external communications. The study would be based on external market research, an assessment of academic and co-curricular programs, and attitudes of campus constituents and alumni.

To distinguish itself in the crowded mid-sized state university landscape, the University seeks to build its brand around programs of distinction, and ultimately still seek prospective students to answer our call to



action – Choose Kutztown. While the quality of our academic and co-curricular programs must be at the core of the student experience, it also must extend to demonstrate student and alumni outcomes and contributions to the greater community.

#### **4.3 Statement of Need.**

Kutztown University must develop a coherent, integrated marketing program, built around and utilizing a broad range of communication platforms (traditional and digital media), to increase brand awareness, secure a stable and consistent enrollment, and enhance campus engagement. Our goal will be to enhance perceptions within our target markets and campus constituents, determine our key differentiators and positioning within the current competitive environment, and highlight KU as an institution committed to continued growth and innovation.

New positioning will be developed that will align key messaging and marketing activities that will ensure that prospective students receive consistent, relevant, compelling messages from the University at the optimum times during the college decision process. In addition, this positioning will be utilized to develop the most effective communications, touch points, and brand attributes that can be used to focus the University as an institution that creates valued and lasting relationships with students, faculty, staff, alumni, and the greater community over time.

#### **4.4 Target Audiences.**

The target audiences for this integrated marketing program include in priority order: (1) prospective students and their families, (2) internal constituencies including current students, faculty, and staff, (3) alumni and friends of the University. Kutztown University attracts a traditional undergraduate college-age population of 18-22 year-olds, and in addition offers graduate programs that attract students ranging from 22-65. Our geographical recruitment region includes Berks County and the surrounding 12 counties, with the addition of targeted areas in New Jersey, Maryland, New York, and Delaware.

#### **4.5 Marketing Program Expectations.**

Through this study, Kutztown University is seeking to develop a memorable brand, better define and establish its distinctive attributes, and determine the best ways to tell the stories of our students and alumni. The University needs to communicate its advantages succinctly and in a way that makes it easily understood for both internal and external audiences. A distinctive, coherent message, centered around the University's identified brand attributes, needs to be threaded throughout existing programs and should also guide the development of new programs in all areas (from academics to athletics/student life to outreach beyond campus).

While prospective students and their families rank first among target audiences, the Kutztown University message also must be clearly articulated for and adopted by the campus community, alumni, current parents, and friends. Further, to aid student recruitment, KU needs to increase its regional visibility as a public institution of choice and differentiate itself among the competitive set in the minds of prospective students and their families, as well as the general public. Increased visibility will also build campus and alumni pride and encourage further engagement with the University.

Immediate Priorities:

- **Research** – Clearly articulate our competitive set, and identify the key attributes that sets KU apart from its competition locally and regionally.
- **Brand Awareness** – Ensure that our target markets know Kutztown University, and have top of mind awareness of our key attributes.

- **Enrollment** – Achieve a consistent number of first year, transfer, international, and graduate students annually, in alignment with the University’s enrollment goals.
- **Internal Messaging** – Create a set of key messages and brand attributes that can easily be shared with current students, faculty, and staff. The goal is to equip each member of our campus constituents with talking points and positive Kutztown University stories to attract and engage others in what are memorable experiences in and around our campus community.

#### 4.6 Deliverables.

**\*\*\*Please note\*\*\***

**Vendor assistance with the university’s rebranding initiative will occur in 3 phases. The scope of KURFP-0239 includes phase 1 ONLY. Information on subsequent phases is provided below for the vendor’s information but is NOT being solicited at this time.**

#### **Research & Development– Phase I**

By deeply delving into the experiences of and desired by prospective students, their families, current students, faculty and staff, Kutztown University will be able to carve out a differentiated position in an increasingly competitive marketplace.

The desired vendor partner will conduct market research to:

- (1) evaluate awareness and perceptions among prospective students and influencers;
- (2) assess Kutztown University’s competitive position with regard to student recruitment;
- (3) evaluate current student/faculty/staff attitudes and perceptions;
- (4) evaluate alumni and donor attitudes and perceptions regarding the institution as a basis for their continuing support.

Based on the research findings and agreed-upon goals, the vendor will develop comprehensive brand refresh elements that clearly identify the appeal and differentiates the value that Kutztown University provides to its stakeholders.

#### ***Planning – Phase II***

*The vendor will develop a marketing plan, including resource allocation recommendations that will drive brand awareness, enrollment, and campus engagement. The development of the plan will include an audit of existing marketing activities and messages, in both traditional and digital media. This information will serve as a foundation for making the best decisions at all levels of planning, strategy and execution.*

#### ***Implementation – Phase III***

*The vendor will partner with Kutztown University, advising on and/or implementing the marketing plan objectives. Preference will be given to firms that can provide writing, design, production, and other assistance, in a wide variety of admissions materials and communications media, in the implementation of the plan. The selected partner will also provide regular reports related to external marketing activities.*

## SECTION 5

### COST PROPOSAL INSTRUCTIONS

#### **5.1 General Information.**

Suppliers will not only be evaluated on the overall cost of providing the requested service, but also on their ability to meet the needs of the University.

#### **5.2 Cost Proposal Information.**

Supplier shall indicate all related costs for undertaking these services for **the Phase I portion of the rebranding initiative only**. These costs would include the Supplier's appropriate fee structure, any related overhead costs associated with various projects or activities, including reasonable travel expenses subject to the approval of the University etc.